Commonwealth of Massachusetts

Massachusetts Bay Transportation Authority

**Accessibility Audit Testing and Services for
The RIDE Paratransit Transportation Management
Software**

December 16, 2024

[RFQ# 269-24]

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I.   General Procurement Information

Procuring Department:	MBTA Procurement and Logistics
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RFQ File Name/Title:	Accessibility Audit Testing and Services for The RIDE Paratransit Transportation Management Software
RFQ File Number:	[RFQ# 269-24]
Procurement Category:	Information Technology - Related Equipment, Services & Supplies / SERVICES-All Other Not Shown or Combinations under statewide contract IT Accessibility Services ITS61designatedITD ("ITS61")

II.   Description of Procurement

The MBTA ("**Agency**") is seeking quotes from qualified vendors on statewide contract ITS61designated ITD Category A that can complete code compliance reviews, conduct user testing, and provide technical support during remediation for The RIDE's SAAS-based Transportation Management System (TMS), to be delivered by vendor Spare Labs Inc. ("**Software Publisher**") under a proposal of work submitted to Agency ("RFP# 146-22 The RIDE – Paratransit Transportation Management System").

Agency is committed to achieving meaningful accessibility for all users, including users with disabilities. For the development and acquisition of software, Agency follows specific Commonwealth enterprise standards, including standards related specifically to the accessibility features of a given system. These standards include the MassIT Enterprise Information Technology Accessibility Standards and the Web Accessibility Standards, Version 2 (collectively the "**MassIT Accessibility Standards**") issued by the Massachusetts Office of Information Technology Division ("**MassIT**"), available online at http://www.mass.gov/accessibility. In addition, Agency requires that its systems interoperate with the environments listed on the Assistive Technology/Information Technology Environment List (the "**AT/IT Environment List**"), available online at http://www.mass.gov/accessibility. All services provided by the successful Bidder must comply with the MassIT Accessibility Standards and all software, if any, must interoperate with the environments listed on the AT/IT Environment List.

For purposes of this engagement, the successful Bidder must test configured software and documentation, both for the system in chief and for training and documentation purposes, against the MassIT Accessibility Standards using the subset of the AT/IT Environment List available online at https://www.mass.gov/guides/generic-assistive-technology-and-information-technology-atit-environment-list
The successful Bidder may measure accessibility compliance using the World Wide Web Consortium's Web Content Authoring Guidelines, version 2, level AA (the "**WCAG2 Standards**"), as defined at http://www.w3.org/WAI/intro/wcag.php, in place of (1) Section 2, Technical Standards – Applications of the MassIT Enterprise Information Technology Accessibility Standards and (2) Sections 1 through 5 and Section 8 of the Web Accessibility Standards.

III.   Scope of work and deliverables

The RIDE's TMS manages reservations, scheduling, and dispatching of its paratransit services. The chosen vendor requires to provide a customer-facing webpage, a mobile application for self-service booking and trip tracking, and an in-vehicle driver application that can be installed on Android tablets to assist drivers with their manifests and navigation.

Objectives:
The objectives of the Digital Accessibility Audit are to:
- Find areas in the Transportation Management Software that are not compliant with WCAG 2.1 A and AA standards.
- Provide a report detailing these barriers and propose acceptable solution to these barriers.
- Work with MBTA to verify issues have been addressed after implementation of changes is complete.
- Repeat on a periodic basis, tied to the release of new features or updates that impact the user interface (follow-up testing is not expected for backend changes that do not affect the frontend).

Application Description:
The TMS vendor is supplying a software solution that will include the following modules and features:
1. Spare Launch (reservations, scheduling, dispatching, and routing module);
2. Spare Analyze (reporting and analytics module);
3. Spare Engage (eligibility management module);
4. Spare Open Fleets (automated trip brokering to NDSP module);
5. Spare Realize (for simulations and what-if scenarios); and
6. Spare app suite, including rider app, rider web (rider-facing interfaces for trip booking) and driver app (driver-facing interface) mobile application and web portals.

The selected Vendor will be given access to the TMS and will include user profiles designated for testing purposes, covering both the Administrative, Customer, and Driver interfaces. The Customer interface comprises a web application and mobile applications available on both iOS and Android platforms. The Administrative interface includes a web-based application utilized by the call center agents for booking, scheduling, and dispatching trips, as well as a separate mobile Android application to be installed on driver tablets

within the paratransit vehicles. The Driver interface comprises a web application accessed via tablet in-vehicle.

Audit Testing Requirements:
The audit will cover all major screens and elements used for the following functions but not limited to, considering both the Customer and Administrator perspectives, as applicable.
- Customer Sign-Up/Login (Self-Service)
- Customer account management (Self-Service)
- Manage trip (booking/canceling) (Self-Service)
- Favorite locations (Self-Service)
- Trip history (Self-Service)
- Manage funds (Self-Service)
- Trip status, ETAs and live vehicle tracking (Self-Service)
- Account management (Admin)
- Reservations (Admin)
- Scheduling and Dispatch (Admin)
- Service Planning (Admin)
- Customer profile management (Admin)
- Reporting and Analytics (Admin)
- Payments (Admin)
- Communications and trip notifications (Admin)
- Subscriptions (Admin)

Global testing will be performed for all style elements and will include testing of:
- Aria labels
- Font and button contrast
- Font sizes and labeling of headings
- Skip redundant navigation
- Image alt text
- Color contrast for all copy and background elements

Navigation elements will be covered through the testing of User flows including:
- Unregistered login flow
- Tooltip icons and associated pop ups
- New registration flow
- Forms are easily navigable via keyboard and screen readers, including field labels, placeholder text, and error states
- Navigation to Terms & Conditions and End-User License Agreements

- More info icons and associated pop ups

Testing will ensure that modals properly take over the screen and are navigable via keyboard and screen readers without losing focus to the page beneath

The MBTA will make sure these pages are setup with appropriate test data, so the audit will catch as many potential opportunities for improvement as possible.

Who Will Be Using It:

Administrative users will include the following:

- MBTA Staff (both full/part-time employees and contractors with admin permissions), including:
  - o Office for Transportation Access
  - o Accounting/Finance
  - o Charlie Service Center
- The RIDE Access Center Staff, including:
  - o Reservationists
  - o Schedulers
  - o Dispatchers
  - o QA team
  - o TRAC Managers and Leads
- Dedicated Service Provider Staff, including:
  - o Drivers (Driver app)
  - o Window Dispatchers
  - o Management Staff
- Mobility Center Staff, including:
  - o Mobility Center Agents
  - o Mobility Center Managers and Leads
- Edenred agents
- Regional Transit Agencies including BAT and MetroWest

In What Circumstances:

Administrators will be using this software to manage and monitor all aspects of MBTA's paratransit service delivery, including (but not limited to) fleet management, trip reservations, scheduling, and dispatching.

Customers will be using this software to book or cancel trips, receive trip notifications, manage contact information or other personal information within their accounts, and manage payment methods and accounts.

On What Devices:

Both Administrators and Customers will be using this software on a combination of devices. The software is fully responsive so it can be sized to fit any device screen. A full listing of environments to be used in testing can be found at: https://www.mass.gov/guides/generic-assistive-technology-and-information-technology-atit-environment-list

The following are example use cases and assistive tools, but is not exhaustive:
- Desktop
- Tablet
- Mobile
- IOS and Android

Blind and Low-Vision Users:
- Windows Operating System (OS): JAWS with Chrome, NVDA with Firefox
- Mac OS: VoiceOver on Safari and Chrome
- IPhone Operating System (iOS) mobile devices with VoiceOver and TalkBack
- Screen magnifiers such as Windows Magnifier, ZoomText and iOS' native magnifier across the above platforms as applicable.

Dexterity limitations:
- Keyboard-only navigation across all OSs

Brain-based limitations:
- Including (but not limited to) people with learning disabilities such as dyslexia, Attention-Deficit Hyperactivity Disorder (ADHD)/Attention Deficit Disorder (ADD), and people on the autism spectrum
- Manual review of content layout, information hierarchy, and automatically moving content (like looping videos)

User/Expert Website Review:
Engage four (4) to five (5) users/experts with lived experiences of physical, sensory or brain-based disabilities in remote user/expert review sessions, to perform in-depth testing and evaluation of potential pain points and other areas identified during the internal review.
- The group of users/experts will include people who are blind or have low vision, older non-native technology users, and people with brain-based disabilities
- Will include guided contextual research, with some tasks identified to guide users/experts through
- Will also include time for free navigation

- Testing will be recorded and provided to the MBTA

Deliverable - Digital Accessibility Audit Report:
Vendor will submit a comprehensive report detailing the results of the Digital Accessibility Audit including a categorized list of potential barriers for users with sensory, physical, learning and other disabilities.
This list will identify:
- Description of the evaluation methods used.
- Summary of all guidelines tested and the current pass/fail rate of the website.
- Summary of each page tested.
- For failed pages, identification of issues and associated guidelines (WCAG 2.1, Section 508, and other relevant state guidelines).
- Classification of issues by severity.
- Recommendations and proposal for resolving issues.

Remediation:
Once the list of issues has been identified, vendor will discuss the audit report with the MBTA, who will then begin working with the Transportation Management Software vendor to remediate the identified issues as outlined.
As updates are implemented, Vendor will review and verify the updates meet the needs as outlined by the Audit Report.

Common Task Outline for Administrators:
- Navigate to either the app or webpage
- Create a new administrator account
- View and edit/save administrator account
- Delete administrator account
- Log in
- View dashboard
- View the Live Map
- Use the Live Map to view trip, route, and vehicle details
- View and edit/save customer account
- View and edit/save driver record
- Create, modify, delete, and import vehicles
- Create, modify, delete, and import fleets
- Create, modify, delete, and import driver shifts/routes
- View and edit service area maps
- Create and edit timing rules for service delivery

- Creating and editing location to be used for pickups and dropoffs
- Book a trip
- Create and cancel recurring (subscription) trips
- Edit a trip, including time of trip or pickup/dropoff location(s)
- Creating favorite locations in a customer profile
- Cancel a trip
- Create and send scheduled customer communications
- Create and send ad hoc customer communications
- Update customer communication/notification settings
- Create and send messages to drivers
- View trip details prior to pickup
- View trip details while customer is on vehicle
- View trip details after trip completion
- Manually move a trip between fleets/vehicles before pickup
- Push trip to non-dedicated service providers via API
- Access customer payment account balance
- View and manage charges to customer account balance
- Change administrator settings
- View and use dashboards in Spare Analyze analytics tool
- Create new reports
- Generate existing canned reports
- Utilize the Spare Realize tool to run service simulations and analyze data of results
- Create, manage, and delete administrator notifications

Common Task Outline for Customers:
- Navigate to the webpage or app
- Create an account
- Log in
- Reset password
- View scheduled trips
- Book a trip
    - o Set pickup and drop off locations
    - o Select trip type
    - o Select date/time
    - o Select mobility device
    - o Add service animal
- Check trip status/ETA
- Receive trip status notifications

- Cancel a trip
- Update customer account information (including contact information)
- View trip history
- View and modify account balances

Common Task Outline for Drivers
- Log into app
- View and select trips and trip and customer details from trip manifest
- Utilize maps and turn-by-turn directions to navigate to destinations
- Communicate with Dispatch via sending and receiving canned or freeform messaging
- Perform the various discrete tasks involved in completing a trip, including arrive, pick up, drop off, and complete
- Initiate breaks in service, including lunch breaks

Vendor-Independent Perspective
The successful Bidder is charged with independently evaluating the Software delivered (or to be delivered) to Agency to determine whether it complies with the required MassIT Accessibility Standards. The successful Bidder must be independent from Software Publisher and have the freedom to identify any deviations from the MassIT Accessibility Standards of the Software.

Accessibility Conformance Report (ACR)
A Software Publisher ACR for the relevant Software is separately posted to COMMBUYS along with this RFQ. The successful Bidder is required to review and consult such ACR in performing its analysis.

IV. **Bidder Responses**

✓	**Response Check List**
	Signed Cover Letter
	Business and Technical Response
	Cost Response
	MBTA Standard Contract with Bidder's

✓	**Response Check List**
	signature

Responders must include the following information in their quotes:

A.   A signed cover letter including agreement to all of the terms of this RFQ;

B.   Separate (a) Business and Technical and (b) Cost Responses. The Business and Technical Response must not include any cost information; Agency reserves the right to discard bids in which the Business and Technical Response includes cost information.

   a) Business and Technical Response must include:
   - A brief narrative of your previous experience that qualifies you to deliver the services requested in this RFQ

   - Proposed approach to how the Bidder will provide the services described herein, generally describing the methodology, timelines and keys to success. The bid must include a narrative statement of work describing services, knowledge and relevant experience, and approach for providing the deliverables described in this RFQ. This should not exceed 5 pages.

   - Please include your required lead times for new initiatives, relevant work cadences, and expected turn around time for delivery for both a new project and for changes to an existing project.

   - A description of all dependencies and/or assumptions made by the Bidder

   - A full description of Bidder company resources to be utilized for this contract including any outsourced resources (contracted non-company managed resources). Bidders must provide a list of staff to be assigned to the project, their roles and a copy of their resume or description of relevant experience, any relevant certifications held by them, and their

availability to begin and continue working on this project

- A minimum of three (3) references for customers (either currently under active contract with the Bidder or previously under contracts which expired within the past three (3) years) that are similar in size and scope to Agency and for which the Bidder provided services similar to those described in this RFQ. This section must include a brief description of the scope and duration of the engagements and the standards that were tested. Experience with assessments based on the Section 508 Standards or the MassIT Accessibility Standards are preferred but not required.

  b) Cost Response must:
    - Include hourly rates for Bidder resources included in its proposal as the extent of the project scope is uncertain and the Agency expects to extend this engagement to additional work that is related to that described in this RFQ but beyond its scope.
    - The cost proposal must be all-inclusive and include all travel and expenses. Agency will not pay any costs not included in the cost proposal.

V.   <u>**Procurement Calendar and Process**</u>

All times in this RFQ are prevailing Eastern Time.

CALENDAR EVENT	DAY	DATE	TIME
RFQ Responses Due	Wednesday	1/8/2025	2:00 PM

After the deadline for response submission 1/8/2025, Agency reserves the right to extend a Best and Final Offer Opportunity to all or a selected number of responders. Responders may be asked to submit additional information specific to project specifications and cost.

It is Agency's intention, barring unforeseen circumstances, to make a final selection by January 17, 2025.

VI. Evaluation Criteria

Qualified vendors and sub-contractors must be able to demonstrate technical expertise and prior experience testing systems for compliance with accessibility standards, laws and regulations.

The responses to this RFQ will be evaluated based on the criteria listed below. The criteria are listed in descending order of importance with the most important criteria in each section listed first. Business and Technical elements will be scored separately from Cost.

1) Availability and proposed Approach
2) Prior Experience and Qualifications of the Company
3) Qualifications and Capabilities of Proposed Staff

VII. Instructions for Submission of Responses

Interested Bidders must submit one (1) electronic copy of the response to the RFQ via COMMBUYS. Responses must be received no later than the response due date and time indicated in the Event Calendar above or they will not be evaluated.

Unnecessary samples, attachments, or documents not specifically requested in the RFQ should not be submitted. Bidders must adhere to the procedures as outlined herein. Responses to this RFQ or any parts thereof received by the MBTA after the required date and time will be rejected as unresponsive to the RFQ. Delivery of responses to any office or location other than the email address listed in this section will NOT constitute receipt by the MBTA. It is the sole responsibility of the Bidder to ensure that responses are received at the proper location, prior to the stated deadline, and that MBTA personnel properly acknowledge the receipt.

VIII. Expected Duration of Contract

Initial duration: Three years with two one-year options

Renewal options: At Agency's discretion the contract entered under
this RFQ may be extended for an additional 12
months.
Anticipated start date: February 3, 2024

IX. __Acquisition Method__

This is a rate-based procurement. The Agency expects that additional
work related to the project described in this RFQ is required following
the completion of the initial work described herein, and reserves the
right to hire the successful Bidder at the hourly rates included in its
bid to complete additional work related to that engagement.

X. __General Information__

A. __Bid/Response Rejection:__ Agency reserves the right to reject
any or all bids (responses), in whole or in part and for any
reason deemed necessary. Bidders who fail to check for
amended RFQs and submit inadequate or incorrect responses.
Bidders are advised to check the "last change" field on the
summary page of RFQs for which they intend to submit a
response to ensure that they have the most recent RFQ files.
Bidders may not alter (manually or electronically) the RFQ
language or any RFQ component files. Modifications to the body
of the RFQ, specifications, terms and conditions, or which
change the intent of this RFQ are prohibited and may disqualify
a response. Agency reserves the right not to enter any
agreement under this RFQ.

B. __Contract:__ The Contract will consist of, in order of importance,
the Memorandum of Agreement, MBTA Terms and Conditions,
the Standard Contract Form, this RFQ (as it may be amended),
the Bidder's response thereto, and any Statement of Work
negotiated by the parties.

In the event of a conflict in language between any of the above-
mentioned documents, the provisions and requirements set
forth or referenced in the document of highest priority in the
conflict, starting with the MBTA Memorandum of Agreement,
which has the highest priority of all such documents, shall
govern. In the event that an issue is addressed in the Response

that is not addressed in the RFQ, no conflict in language shall be deemed to occur.

XI. Miscellaneous

A. General

By submitting a proposal in response to this RFQ, Bidders agree to the following terms:

1. Agency will not pay for any costs other than those set forth in the Bidder's response to this RFQ.

2. All bids submitted in response to this RFQ must be valid for a minimum of ninety (90) calendar days.

3. Extraneous marketing or promotional materials are discouraged and such information will not be factored into the evaluation of Bidders

4. Agency will not pay any charges not set forth in this RFQ.

B. Bid/Response Rejection

Agency reserves the right to reject any or all bids (responses), in whole or in part and for any reason deemed non-compliant or non-response per this RFQ, its attachments or any subsequent changes. Bidders are advised to check prior to submitting a response to ensure that they have the most recent RFQ files. Bidders may not alter (manually or electronically) the RFQ language or any RFQ component files. Modifications to the body of the RFQ, specifications, terms and conditions, or which change the intent of this RFQ are prohibited and may disqualify a response. Agency reserves the right not to enter any agreement under this RFQ.

C. Contract Amendments

Agency reserves the right to amend this RFQ or any contract resulting from this RFQ. Agency may negotiate changes to the original performance measures, reporting requirements or payment methodologies tied to performance at any time during the contract duration if they are consistent with the specifications of this RFQ. Agency reserves the right to negotiate and execute contract

amendments with the contractor(s) which Agency determines as necessary to result in the intent of this RFQ, to amend the specifications for necessary requirements, or to result in a better valued contract. Negotiation would be with the successful Bidder of this RFQ. Amendments may include, but are not limited to, contract dollars, contract performance, increased or decreased obligations, scope of work, quantity, etc.

D.   Limitations.

This RFQ does not commit the Agency to approve a Statement of Work, pay any costs incurred in the preparation of a Bidder's response to this RFQ or to procure or contract for products or services. Agency reserves the right to accept or reject any and all proposals received as a result of this RFQ and to contract for some, all or none of the products and services as a result of this RFQ. Agency further reserves the right to negotiate with any or all qualified Bidders and to cancel in part or in its entirety this RFQ if it is in the best interest of Agency to do so.

E.   Review Rights

Responses to this RFQ may be reviewed and evaluated by any person(s) at the discretion of Agency including non-allied and independent consultants retained by Agency now or in the future, for the sole purpose of obtaining an analysis of responses. Any and all respondents may be asked to further explain or clarify in writing areas of their response during the review process. Agency retains the right to request further information from respondents.

F.   Nonresponsive Bids

Agency reserves the right to exclude from further consideration nonresponsive bids that fail to meet the submission requirements of this RFQ.

G.   Proprietary Notices.

All bids submitted in response to this RFQ shall be public record. All notices included in such bids to the effect that bid content is confidential or proprietary, that the distribution of such bids is prohibited or that by opening or accepting the bid Agency is accepting such terms, are null and void, and any portions of the response so marked shall still be considered public record.

H. **Instructions on Accessing the Documents that are Separately Uploaded to COMMBUYS.**

1. Go to COMMBUYS (www.commbuys.com)
2. Log into COMMBUYS, locate the Bid, acknowledge receipt of the Bid, and scroll down to the bottom of the Bid Header page.
3. If Bidder has any issues with responding through COMMBUYS, contact the COMMBUYS Help Desk at COMMBUYS@state.ma.us or call during normal business hours (8AM – 5PM Monday – Friday) at 1-888-627-8283 or 617-720-3197. Training and guidance may be found on the COMMBUYS "key resources" page.

Generic Assistive Technology and Information Technology (AT/IT) Environment List
Version 2.0
This Generic Assistive Technology and Information Technology Environment List is intended for ITS61 vendors, the MassIT Assistive Technology Group staff, and third party accessibility testers. All ITS61 vendors, MassIT Assistive Technology Group staff, and third party testers are subject to the following rules. Testers are only required to:

(1) Test contract deliverables against the most current versions of the operating systems, GUI desktops, applications, browsers, and assistive technology listed below, unless otherwise indicated in the RFR or RFQ by the procuring agency. Prior versions are referenced only to enable the vendor to anticipate potential user problems.

(2) Test the portion of contract deliverables that constitute administrator or end user interfaces (prototype or final), rather than back end system elements, against the operating systems, GUI desktops, applications, browsers, and assistive technology listed below and

(3) Test contract deliverables against the most current version of the GUI desktops and applications listed below. This requirement only applies if an interaction between the IT system being delivered and the user's implementation of such desktops and/or applications is a required feature of such system.

Revision date	Version	Updates
September 10, 2009	Version 1.1	Software versions updated

April 23, 2010	Version 1.2	Software versions updated
May 24, 2011	Version 1.3	Software versions updated
February 10, 2012	Version 1.4	Software versions updated
March 12, 2013	Version 2.0	Added mobile platforms, operating systems, and related assistive technologies; software versions updated
February 27, 2015	Version 2.1	Software versions updated